

OCTAVIA HOUSING PROCURES ENTERPRISE IT SOLUTIONS

> ITSS Success Story

Octavia is one of London's leading housing associations, providing thousands of people in some of the most expensive areas of London with good-quality, affordable, sustainable and well-managed homes, alongside care and support services and community projects.

As part of a broad-based business transformation programme, Octavia required an upgrade to both its financial systems and HR & payroll solutions. After some initial market investigations, and some demonstrations and discussions with potential IT solution vendors, it was decided to seek external specialist IT procurement assistance.

"We felt that the strategic importance and level of expected spend on this project demanded that we brought in specialist external IT procurement assistance," said Geoff Parnell, Head of Finance Transformation at Octavia.

"It was not only essential that we selected the right solution for Octavia but also that we achieved the best possible value from this procurement. In addition, as **Octavia is in receipt of public funds and bound by public procurement regulations, we needed a consultancy that could help us navigate the procurement options and remain compliant.**"

After a review of options, Octavia decided to appoint ITSS Limited as their procurement consultants. "We felt that ITSS offered the necessary mix of high-level business advisory, IT transformation expertise and public sector procurement capability that was needed," said Geoff.

After reviewing the status of existing requirements, specifications and actions taken prior to their appointment, ITSS reviewed the range of public procurement options available to Octavia, including existing Framework options such as the government's G-Cloud route. After discussion it was agreed to adopt a Competitive Negotiated procedure.

"There were a number of options that we could have followed," said Geoff, "but with the support and knowledge of Michael and Robert from ITSS we were able to select a procurement route that we felt would deliver the most competitive environment, with the right mix of capable vendors and the necessary flexibility required for us to be able to crystallise and fine-tune our business and system needs."



"ITSS was also instrumental in helping us identify the right level of budget required for the project, which was essential to get the necessary internal board level support in advance of starting the procurement process."

Over the coming months the procurement proceeded through the structured procurement process, with ITSS working with Octavia on the content and structure of the various requirements and tender documents. ITSS also helped the Octavia team develop the evaluation and marking processes required to ensure that an open, fair and transparent process was applied. ITSS handled the publication of the necessary procurement notices, the issuing of the documents to vendors and receipt of responses, and acted as the focal point for all supplier communication so that all vendors were treated equally.

"One of the things that we noted was that with ITSS assistance **we had active interest and involvement from a number of very capable vendors that we had previously been unaware of,**" said Geoff. "Not only that but it became apparent that some vendors that we had previously thought of as being viable options were not as capable as first thought and that **the price we could achieve was substantially better than what would have been the case if we had taken different procurement decisions,**" said Geoff.

The process concluded with Octavia selecting two solutions and vendors that they are fully confident are very capable and provide the best overall value for the organisation. In addition, having applied a structured process that involved all the key stakeholders from the organisation, Octavia is starting what will be a challenging business change and systems implementation programme with a level of involvement and commitment that will help ensure its success.

"As we were bound by public procurement regulations, we needed an IT solutions procurement consultancy that could help us navigate the procurement options, remain compliant and get the right solution."

— Head of Finance Transformation

PSS overhaul IT to meet the increased challenges of the social care sector

> ITSS Success Story

PSS is a national charity and social enterprise headquartered in Liverpool that supports people in need. Since its foundation in 1919 it has developed some of the best known names in community support including Age Concern, the Citizen's Advice Bureau and Legal Aid. Today, with over 400 staff in teams spread across 28 locations in the UK, PSS sits alongside Local Government and NHS services plugging the gaps and providing 'on the ground' support for a wide array of people in need.

As part of its strategic planning PSS identified that it needed to upgrade and update its IT systems and services as a key enabler to improving its operational effectiveness and efficiency.

"With NHS and Local Government budgets being squeezed it is essential that PSS is highly efficient and seen to deliver clear value for money to our clients. Making best use of IT is critical to achieving these objectives and we identified that an overhaul of current systems was essential" said Lesley Dixon, Chief Executive.

The first phase of change was to upgrade and update current ICT platforms, network operating systems, and hardware to secure and improve current service provision and reduce current exposure to reduce risks of system or equipment failure.

An initial study undertaken by a recommended IT Solutions vendor had identified a couple of potential options and budgets for replacing existing IT infrastructures, including moving to a fully 'cloud hosted' service and a hybrid of on premise and cloud hosted IT infrastructures and solutions. PSS felt it was essential to bring in independent expertise to sense check that initial study and run a competitive procurement exercise to ensure value for money and to help PSS select the best fit option. They asked IT Solutions & Services (ITSS) to assist them.

"As a registered charity it is important that PSS follows best practice in procurement and makes sure that it achieves the best possible value. We felt that using ITSS would provide us with the necessary mix of procurement best practice, independent IT expertise and market knowledge" said Sharon Edwards, Finance Director at PSS.



"We were also keen to make sure that we shaped our IT staffing appropriately to the new environment, with the right mix of IT staff and skills delivered appropriately from internal staff and external IT service providers. We felt that ITSS would be able to help us in this regard."

Once the scope, objectives, expected outcomes, timeframes and project management processes were agreed Michael Hully from ITSS reviewed the initial study on IT infrastructure and worked with PSS and its current IT providers to produce a detailed Situation Report. This report helped PSS confirm the direction of travel, which was to move to a fully outsourced, cloud hosted platform with Microsoft 365 email and provided the detail needed to take the PSS needs to tender. It also identified a number of important omissions from the previous work and existing IT risks that were previously hidden.

"The Situation Report was itself an important deliverable for us. We were able to use it to keep the Board of Trustees a clear view of where we were going and why, how much it might cost and how long it might take" said Lesley.

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Using their procurement expertise and market knowledge ITSS ran a formal procurement exercise for Hosted IT infrastructure, Wired Network and peripheral refresh, Microsoft Exchange to Microsoft 365 transition services, IT management and support services and MPLS Wide Area network replacement. The bid evaluations and recommendations for short listed suppliers were then presented in a Recommendations Report to the PSS Steering Group.

"The Recommendations Report delivered a detailed analysis that clearly showed how the potential providers had scored against the weighted scorecard we had agreed with ITSS and delivered clear analysis of supplier capability, solution profiles and solution costs. The rigor of the procurement process was extremely high and we would not have been able to achieve anything as professional with our own resources." said Lesley Dixon.

"The financial results were also exceptionally good, not only had ITSS delivered a result that would see us increase the resilience and availability of

our systems, improving Service Levels but one that would save us 29% on our budget for these services" noted Sharon Edwards. "Michael Hully is also assisting us to analyse the IT staffing function and realign it to become more business focused, transferring some support functions to the new vendor"

Following references and a presentation by the preferred supplier PSS agreed to move to contract. The contractual process was completed with the assistance of a specialist IT solicitor but during that process ITSS was able to offer commercial advice and practical support to the Directors of PSS.



"The contractual process was complex and during that time Michael's grounded real-world experience, diplomacy and negotiating skills proved invaluable to achieving a final agreement that worked for us and our chosen supplier. We also asked ITSS to help project manage the implementation" concluded Lesley.

ITSS is continuing to assist PSS with on-going IT Supplier management, project audit and strategic CIO services.

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Sharon Edwards, Finance Director

